

School Admin Match Advisory Committee
Minutes of the February 24, 2004 Meeting held at PSESD

Members present: Nick Johnson-South Bend SD, Tom Hitt-Pasco SD, Tim Merlino ESD112, Michelle Ewell-ESD123, Jerry McDermott-ESD101, Patty Guerrero-Bremerton SD, Brian Lewis-ESD114, Marty Crisp-Battleground SD, John Molohan-ESD113, Jennifer Carrougner-OSPI, Marcie Senger-Tacoma SD, Randy Hauff – Tonasket SD, Craig Numata-Spokane Marcia Riggers-OSPI (for Martin Mueller)

DSHS Staff: Brian Coolidge-Information Systems, Martin Thies-Operations Review & Consultation, Dario Longhi-Research & Data Analysis, Ramona Roberts and Dick Hancock, School Ad Match.

Non-members: Tom Reese – JT Educational Consultants

Status Report: Dick reported that there are now 140 contracting districts as compared to the 250 prior to December 2003 when the new CMS claiming guide went into effect. Some districts are waiting to see how other districts do under the new guidelines, and it is too early to provide any additional status information.

Marcia Riggers, Deputy to Marty Daybell, Assistant Superintendent of OSPI summarized her perspective on School Ad Match and the results of a meeting held on Friday February 20th between OSPI and MAA. She acknowledged that this is a difficult time of transition and affirmed that OSPI will pursue talks with the CMS about what would help make things better in Washington's program.

Dick said the Department of Education and the Centers for Medicare and Medicaid Services (CMS) are not always on the same page regarding Ad Match. MAA takes its guidance from CMS. Karen O'Conner, Medicaid Director from CMS Seattle, wants more Ad Match documentation but has agreed to give MAA until Fall Quarter to meet their requirements.

Tom Reese noted that they (Efcom) have been in contact with other states and recommended that we do the same. Dario suggested that in talking with other states, we look at time studies being used. Brian Lewis noted that the 5 randomly selected days is the most debated issue. The paperwork regarding the time study is extensive.

Dick offered to have Ramona research the web for other states' ad match programs for the April 29th advisory committee meeting. Tim Merlino of ESD112 noted that his agency plans a site visit to Illinois and the committee suggested that ESD112 participate with MAA in developing the summary of Ad Match programs and their status of federal approval.

ESDs and School district representatives were asked to comment on the status of the Ad Match program in their district Responses were as follows:

- ❑ Getting staff trained, dealing with changes in requirements, nervousness about monitoring and declining participation levels.
- ❑ Very cautious about audits, how do you re-train people, people are angry/frustrated, want to use program but amount of billable is way down, cost versus benefit is not there if you're looking at getting funds, no flexibility, a lot of discussion and gray areas.
- ❑ After reviewing TS forms, billable time decreases to about 10%. This will make the district not participate. 90% decrease driven by the random nature of the time study, pressure on educators and the focus is more distracted (teachers aren't flexible enough to deal with having the time study thrown randomly at them).
- ❑ Concern over documentation, collecting more due to fear, having to throw out because the documentation may not support an audit, risk/benefit is more important
- ❑ Districts are checking Ad Match out this year. Not likely to continue

Same as others, teachers are concentrating on WASL, No Child Left Behind, and nurses and psychs concentrating on special education, forms aren't getting done, and work is not being down

- ❑ Three different levels – at the building level, two pieces of paper rather than one, caused negativity, form doesn't work well. Code 9b requires additional Tracking Form, staff won't use 9b because they don't want to do 9b form. The more activities that staff have to do, the less participation.
- ❑ Disincentives: Why fill out more than one activity code for non-Medicaid billable activities. Document only that which counts (billable activities).
- ❑ Decrease (participation) at an increasing rate
- ❑ All this requirements, had to get CSRS (enrollment) info to get MER, delay in payment, wanted the third time study option, the automated system, hours don't have to be added up before exit
- ❑ In the Vancouver (ESD112) region eight out of 30 districts signed the contract and two really doing Ad match.
- ❑ Concerns with MER rate, agree with everyone else
- ❑ We have not included the auditors in the planning. We have been involved in looking at the automated system and think it is too costly to input into the system.

There was a brief discussion of how to reduce the risk of audit findings and paybacks. Some felt that state auditors are not consistent from district to district. OSPI has been

unable to get the audit plan from the State Auditor's Office (SAO), but SAO staff routinely audit to federal and state program, accounting, and contract requirements.

The committee was asked to consider an idea suggested by Scott Blomberg of Hood Canal School District. He says, "With so many social issues and needs, it seems that in these days there should be a social worker in each school building, not only for the Medicaid Adm Match, but for the services that are provided to the general population. Might make a difference in the 'No Child Left Behind' agenda as well." Comments:

- ❑ DSHS could have access to families directly by placing a social worker at each school, and rent space from S.D. to house staff. (The legislature would have to authorize the additional FTEs and state funds – an unlikely action.)
- ❑ Readiness to learn is a good prototype for this type of program.
- ❑ Medicaid Match is only one of many programs to deal with these issues.
- ❑ There is a need for integration of programs and resources to meet the needs.

Time Study (TS)

Dario Longhi summarized where the Time Study is with the Feds, and recapped the TS process and methodology. Dick said that a response from the Division of Cost Allocation on the TS proposal is not expected until fall 2004, when documentation of services is resolved with CMS.

Dario proposed that to estimate the impact of TS Option 3 [see the contract language] and assure statistical validity of the TS, there is a need review and compare the old Ad Match system to the new. Pre-December data could be a useful estimator of future. He noted that there is a need for districts to identify who would be their designated staff, and the variance per day and per person in Ad Match activities.

Tom Reese offered to provide info to Dario for Spring 02-03 and Fall 03-04. However, Dick gave the opinion that the old program had different rules and can't accurately measure the program under the new rules. It was concluded that it would be up to MAA to fund the proposed review of the time study and the methods being used.

Draft Report from the DSHS Office of Operations Review and Consultation

The committee began their lunch break and Marty Thies, Ph.D., program analyst/auditor from the DSHS Office of Operations Review and Consultation presented his preliminary assessment of the MAA's Ad Match manual/training materials and the interlocal agreement, vis a vis the Medicaid the federal Claiming Guide and relevant federal program and accounting requirements. The report (or a summary) will be available to the committee and districts after it is finalized and presented to the Medical Assistance Administration in April.

Dr. Thies' report highlighted key contract and manual provisions that districts could expect would be reviewed by SAO in an audit. For example, the required service

delivery plan that Marty reviewed did not address methods of providing outreach and linkage services. The Medicaid Agency could consolidate and improve the training materials/manual. Consultant contracts would be reviewed for the type of rate being paid (the contract disallows a contingency fee such as a percent of the Medicaid revenue claimed by the district). Training should be documented by districts, etc..

Dick said that the ORC report makes clear that districts should be very businesslike in implementing and operating the newly structured Ad Match program.

Training, Technical Assistance and Monitoring

The discussion moved to training, monitoring and technical assistance to be provided to districts. Dick noted that ESD112 is interviewing for these positions under a new inter-local agreement, and the ESD brings to the table a good understanding of school district perspective. The ESD-hired staff will be paid from the 3% admin fee charged by MAA.

The question was asked whether or not the 3% fee would be raised by MAA. Dick responded that MAA won't obligate more than what is projected to be earned using the 3% rate, at least through June of 2005. ESD 112 employees in partnership (and guided by) MAA, will do the monitoring.

A question was asked about randomly select time study days. Dick said that all "work days" rather than school days would be used in Spring quarter. So in-service training days might be selected as well as school days for tracking time.

The MAA Automated System:

Brian Coolidge provided a status report regarding the MAA automated system. He outlined the functionality/capabilities of the system and discussed some business requirements such as confidentiality and the ability of the district coordinator to authorized different levels of access/functions as various levels in the district. For example, the coordinator could set the district up to have every TS participant enter their own time study data in the system, or have one person in each building enter TS results. The coordinator would have authority to review and approve employee salary and benefits data. There will be various reports the coordinator can run in order to evaluate costs claimed by person and/or by building as well as districtwide. The A-19 would be generated automatically once the coordinator has approved the TS and cost data. The A-19 will have to be printed and signed by the district.

The advisory committee's next meeting was scheduled for 10:30 to 3:00 on Thursday April 29th (MAA has since reserved the large conference room in the Burien Library, 14700 Sixth SW.)

Respectfully submitted: Dick Hancock
March 24, 2004